Snohomish County
Human Services

HMIS Data Entry Manual

Training and Reference Guide

A brief guide to entering and using data in the Snohomish County Homeless Management Information System

5/27/2015

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Production and Training Environments

Snohomish County has two separate environments/databases that are used for different purposes. The Training environment is used for practice and training only. The Production environment is the actual HMIS and all work done in this environment is what is recorded.

The Training environment can be found here: https://www.clienttrack.net/snocohsd_train. You must have special permission to access this environment. Not everyone will have access to this environment for any length of time.

The Production environment can be found here: https://www.clienttrack.net/snocohsd. Everyone who uses HMIS has access to this environment after they have completed any necessary training.

The log-ins and user preferences are not automatically the same in both environments.

Client Consent and Release

Clients presenting for services must be made aware of their privacy rights prior to being entered into HMIS. HMIS Client Privacy Rights should be explicit and made clear to the client.

The HMIS Consent and Release of Information Authorization Form defines two vital components of HMIS data entry to the client:

1. Consent to have the client's basic record entered into HMIS and shared globally, and
2. Release of transactional records (enrollments, exits, services, etc.) to other agencies.

Consent and release of information is relevant only to clients not experiencing or fleeing from domestic violence. If this is the case, client data must be made unidentifiable, regardless of whether or not the client would otherwise choose to sign a consent/release of information authorization.

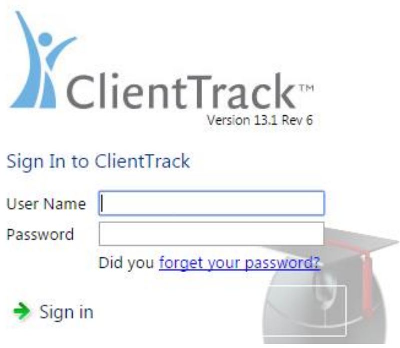
Clients can also complete a Client Revocation of HMIS Consent at any time should they decide to reduce or eliminate the accessibility of their information in HMIS by other agencies.

Logging-In

Logging-In to HMIS for the First Time

After you sign the HMIS User Policy and Code of Ethics and Responsibility Statement and you have received the proper training, you will be granted access into Snohomish County's HMIS.

To log-in for the first time, go to the HMIS site and enter your User Name and the ***temporary*** Password given to you by the HMIS Lead Agency (Snohomish County) staff. The log-in screen looks like this:



Before doing anything else, you will need to change your password to your permanent password, for security reasons. You should automatically be prompted to change your password after logging-in. Your new password must contain at least 8 characters, including at least one capital letter, one number, and one non-alpha-numeric character (such as !,.{}[]@#$%^&*()).

If you are not prompted to change your password, please see the Change My Password section of this manual.

You may also be prompted to update your recovery information, including creating a security question. This question allows you recover your password if you forget it, in the future. If you are not prompted to do this as soon as you sign-in, follow the instructions in the Updating My Recovery Information section of this manual.

Logging-In to HMIS after First-Time Use

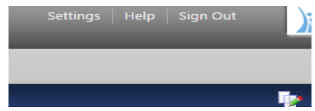
Each time you log-in to HMIS after your first time, you may (but not always) see a screen that looks something like this:

The first box is to allow you to choose the workgroup in which you will be operating. If you only have access to one workgroup, it will be the only workgroup option available.

While you are likely only able to select one organization (typically the organization for which you work), you might have a few location options from which to choose. Contact your agency's leadership to determine if and when to choose a location if multiple options appear.

If this screen does not populate immediately after you log-in, it means you only have access to one workgroup and that your organization only has one location or you only work within one location.

Settings/Help/Sign Out



On the top, right-hand side of the screen, you will find three small buttons: Settings, Help, and Sign Out. These are shortcuts which are available to help you manage your work in HMIS.

Settings

Sometimes users will have access to multiple workgroups because of the kinds of work that they do. There might also be circumstances in which some users have access to multiple locations within their organization. If either/both of these situations apply to you, you are able to switch between your workgroups and locations without signing-out of ClientTrack. To do so:

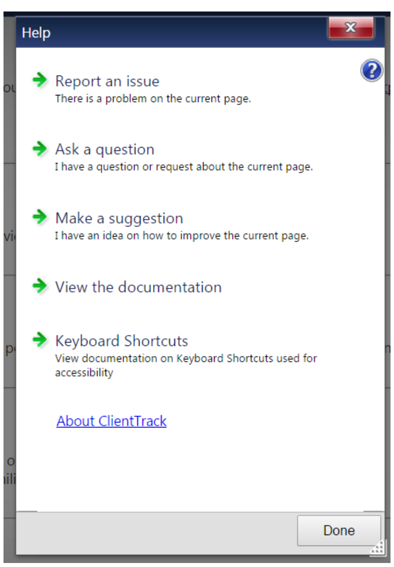
1. Click on the Settings button on the top, right-hand side of the screen.
2. Select the new workgroup and/or location.
3. Click Apply.

The Settings window also includes two shortcuts to other processes: changing your password and clearing your preferences.

When you click on Change My Password, you are automatically routed to the password change screen. For more information on changing your password, view the Change My Password section of this manual.

Help

The Help window allows you to quickly report issues, ask questions, make suggestions, view the ClientTrack User Guide, and identify keyboard shortcuts available in ClientTrack.



Report an Issue

When you select Report an Issue, you are taken to a small form in which you can give a brief summary of the technical or data quality issue you are facing and provide a detailed description of the issue. These reported issues are sent to the HMIS Lead Agency to work on.

It is always recommended that you provide as much documentation as possible when reporting issues to reduce the amount of time that it might take to identify and resolve the issue. A good practice is to take a screen shot of your issue (when relevant) and to note the questions on the page with the issue so that staff can quickly address the problem. Pictures and screenshots can be attached to the issue under the description.

Please note that, when taking screen shots, you should crop-out client identifying information, such as name, social security number, etc. For more information on taking screen shots, please see the Screen Shots section of this manual.

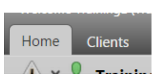
Ask a Question
Similar to reporting issues, the Ask a Question form allows you to ask a short question and provide more detailed background, as well as upload files and screen shots. When you ask a question through this form, it is sent to the HMIS Lead Agency, who will respond to you as soon as possible with clarification.

Make a Suggestion
If you have feedback or have a recommended change that you would like to communicate, submitting it through this form is always best. It also provides the level of detail required from the Submit an Issue and Ask a Question forms.

View Documentation
This link takes you to the ClientTrack User Guide, which provides some helpful information for newer users. It is a standard document and may not adequately address all of the information needed to function as an HMIS user in Snohomish County.

Keyboard Shortcuts
This link takes you to a list of keyboard shortcuts that you can use in ClientTrack.

Sign Out
You are asked to sign-out of HMIS prior to closing the window, as some internet browsers retain your information. For security reasons, it is critical that you use this button to log-out of ClientTrack when you are finished working or when you are leaving your computer.

Home Tab Functions
On the top of the screen under your name, there should appear at least two tabs: a Home Tab and a Clients Tab. 

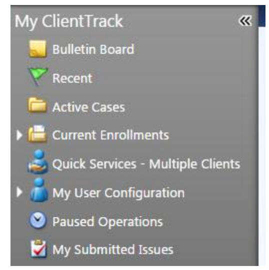
The Home Tab contains information about your cases, recent enrollments, and other helpful items. Each time you log-in to the system, you are automatically brought to your User Dashboard in the Home Tab. It is also how you access information about your user account and preferences.

User Dashboard
The User Dashboard includes a bulletin board, which offers helpful links, resources, and updates that should be viewed whenever a new posting is made. For information about posting to the bulletin board, please see the Bulletin Board section of this manual. The Dashboard also contains Global News. Under Current Program Enrollments in the Dashboard, you are able to view a summary of cases, programs, and enrolled clients.

Reports

On the bottom left-hand side of the screen you will find a few folders, depending on your access level. The "Reports" folder includes options to run basic reports about various common topics and an icon titled "Data Explorer." For more information about Data Explorer, please contact the HMIS Lead Agency staff, who can schedule a training for you.

My ClientTrack

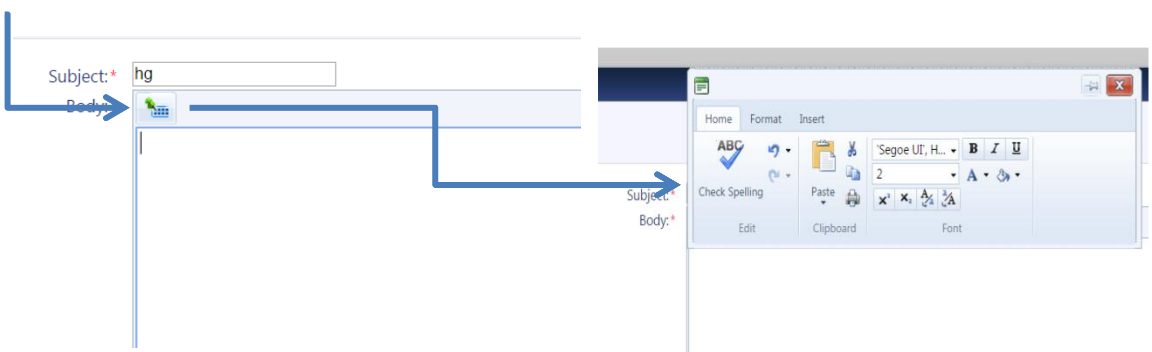


The folder titled "My ClientTrack" on the bottom, left-hand side of the screen brings you to a list of options related to you and the cases you manage, as well as the workflows you have paused and issues you have submitted.

Bulletin Board

The bulletin board can be used by agencies to post information to other users and agencies. It is important to note that these posts will be viewable to all users in the system. Acceptable uses of the bulletin board would include updates to programs, organizational changes, upcoming training notices, etc. Unacceptable uses would include any information pertaining to specific clients, or other information that is not meant to be shared with all agencies.

To post messages to the bulletin board, click on the bulletin board folder on the top, left-hand menu. Then click "Post New Message." Enter the subject/title of the message in the "Subject" field, and then enter the main text of the message in the "Body" field. To edit the formatting of the text, click on the "toggle floating toolbar" to show the editing options. Select save when you are finished creating the message.



Recent

The Recent item in the left-hand menu summarizes all of the recent activity you have undertaken in HMIS.

Active Cases

The Active Cases folder in the left-hand menu shows a list of all of the cases you are currently managing, including the begin date of the case, the end date of the case, and the associated program.

Current Enrollments

The Current Enrollments folder in the left-hand menu allows you to display all clients enrolled in a specific program, the enrollment date, the number of days enrolled, and the number of case members. The "Open Enrollments w/Most Recent Assessment" sub-folder allows you to narrow your search for clients currently enrolled in a specified program.

Quick Service – Multiple Clients

This form allows you to add services to multiple clients at once. This is not a recommended process and should not be utilized.

My User Configuration

Managing your account is an important part of ensuring that your data entry records are maintained and tracked effectively. To check/change your information in the system, go to the Home Tab and click on "My User Configuration" on the left-hand menu. This will bring-down three options: My Information, My Team, and Change My Password.

My Information

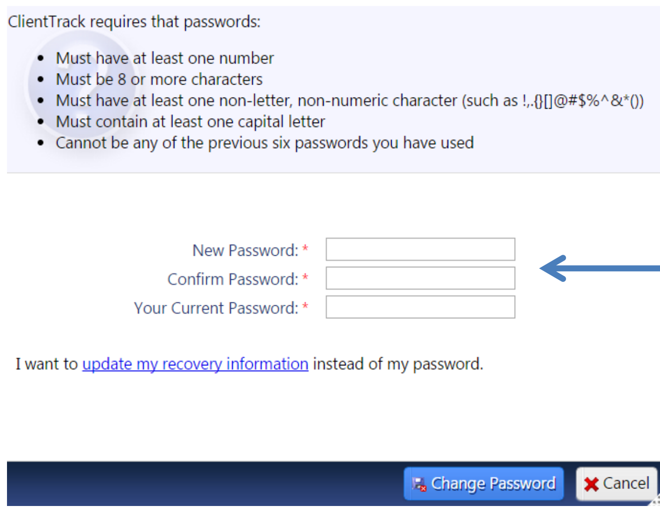
This shows you what HMIS believes to be your current basic contact information. You may change some items, such as your address or phone number.

My Team

This is usually only for supervisors who manage case managers.

Change My Password

When you click on this, a new window will populate, asking for a new password. Enter your new password following the stated guidelines in the New Password field, enter it again in the Confirm Password field, and enter you current password in the Your Current Password field. Click "Change Password" to confirm the change or click "Cancel" to cancel and keep your current password.



Updating My Recovery Information

If you would like to change the email address or security question used to recover your password, should you forget it, there is a sub-link in the Change My Password box which allows you to do so.

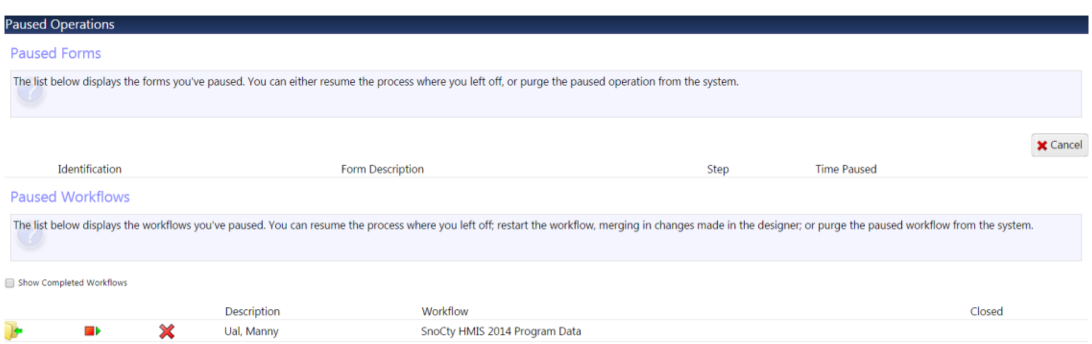
Paused Operations

When you pause a workflow, you are effectively saving the workflow to be completed later-on. The paused operations function allows you to start exactly where you left off, in these situations. When you log back in, go to paused workflows and it will show you the clients you were working on.

 Will resume the workflow where you left off.

 Will start the workflow over, from the beginning.

 Will delete the workflow and some or all of the previously entered data will be lost.



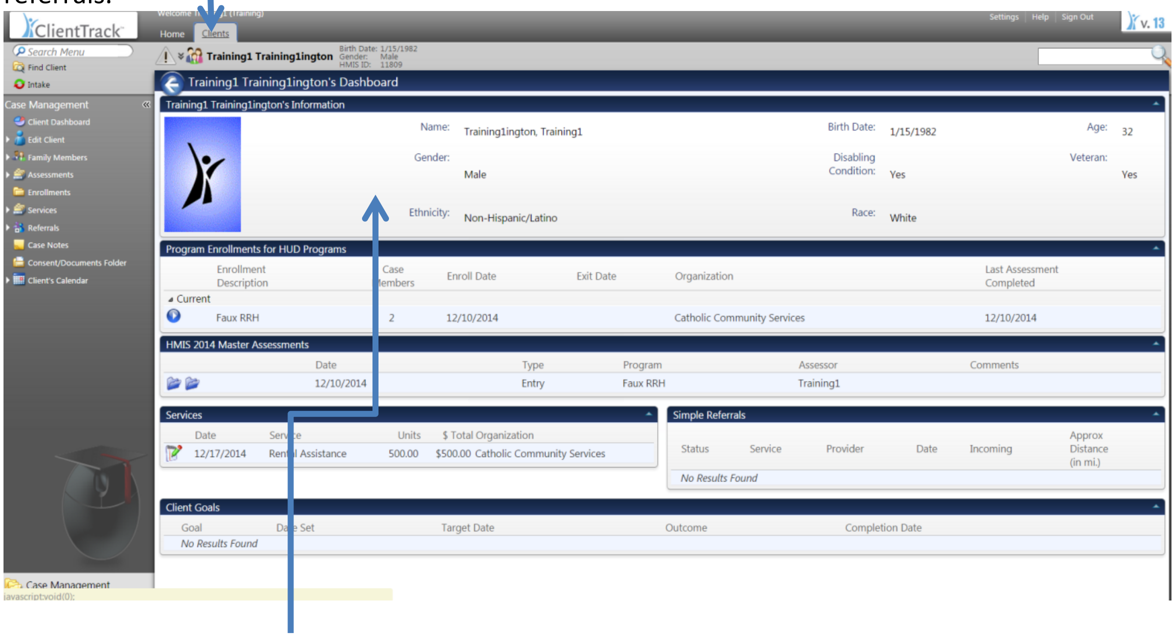
For more information about pausing a workflow, see the Pausing a Workflow section of this manual.

My Submitted Issues

If you submit/report an issue in the system, it will show-up and be tracked in this section. It allows you to follow-up on issues that have not been addressed or to make note of how and when issues were addressed, in the past.

Clients Tab

Most of the data in ClientTrack is entered and accessible through the clients tab. From the clients tab, you have many options such as: creating client records; recording assessments (universal data, employment, health, education, financial, barriers, chronic homelessness, domestic violence, self-sufficiency matrix, veteran detail, etc.); recording services and program enrollments; tracking client goals and action plans; recording case notes; identifying tasks for the client; and tracking provider referrals.



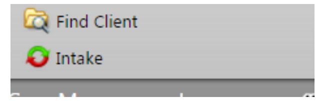
Client Dashboard

The first screen you will see when in the clients tab is the client dashboard of the last client you viewed. It is a summary of the client's information, including basic demographic information, program enrollments, services provided, and any assessments that have been completed. Depending on agency procedures, case notes, referrals, client goals, and tasks can be denoted in this area, as well.

Workflows

Client Intake

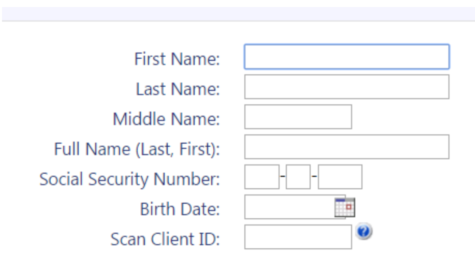
On the top, right-hand side of the screen under the clients tab, you will see two icons: one labeled Find Client and the other labeled Intake.



Finding an Existing Client

If you know that the client with whom you are working has already been entered into HMIS, you can select Find Client. When you do this, a screen will appear asking for several pieces of information. Enter only what you know will be in the system and select the Search button.

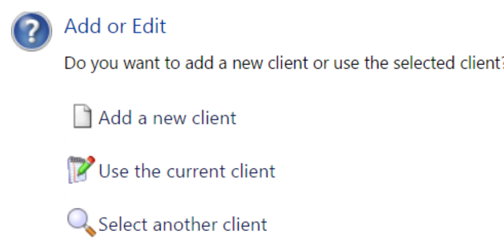
If your client appears, select the client's name and it will take you to the client's dashboard.



If your client does not appear, it could mean that the client's record has not been entered into HMIS OR the record that was entered into HMIS included different information OR the client's record was entered into HMIS under a security level that restricts your ability to view the client's record.

Adding a New Client

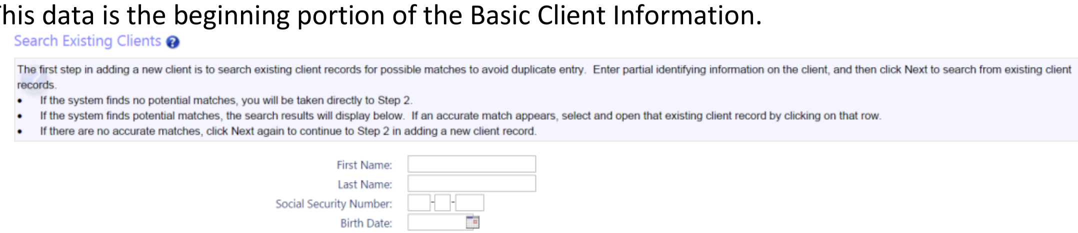
If you are unsure whether or not the client with whom you are working has already been entered into HMIS and the client is currently seeking services, select the Client Intake button. This brings you to the Add or Edit screen. You can Add a new client, Use the current client (or the client on whose dashboard you were just on), or Select another client.



Selecting another client or using the current client means that you are enrolling the client into a program after the client's basic data has already been entered. Taking this step helps reduce the risk of entering a duplicate client record into HMIS. Duplicate clients create inaccuracies in Snohomish County's data. For more information about duplicate clients, please see the Duplicate Client Records section of this manual.

If the client does not have an existing HMIS record that you can see, select Add a new client.

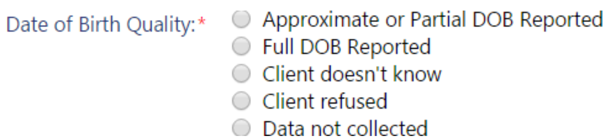
The first screen that appears allows you to Search Existing Clients. This is a required step to double-check that your client truly does not already exist in the system. Enter all relevant data and choose Next. This data is the beginning portion of the Basic Client Information.



Basic Client Information/Client Demographics

The next screen to appear will either be a list of existing clients who resemble at least some of the information you entered OR, if no similar clients can be found, the Basic Client Information form. This form allows you to continue entering information about the client.

The item called "Name Quality" is a mandatory item in which you will indicate whether the name you received from the client is a correct and complete name, a partial or incomplete name, or an alias of some kind.



Similarly, the item called "Date of Birth Quality" helps to identify the level of accuracy of the birth date in order to help more accurately reflect whether or not clients are adults or minors.

Enter the remaining demographic information. It is absolutely critical that Disabling Condition and Veteran Status be accurately denoted in this section, as these responses affect future assessments.

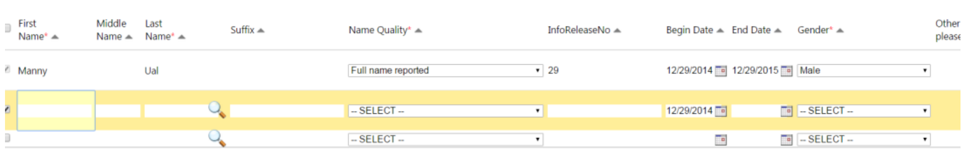
Family Information

On the same screen as the client demographics is the Family Information. Enter the Family Information by clicking the magnifying glass to search for existing families. If none exist, select Add New Family.

Adding a new family allows the system to link groups of people presenting together for services and who would otherwise choose to live together. The Family Name should be the head of household's Last Name, First Name – Birth Year. You will need to enter the head of household's City, State, and Zip. If the client is literally homeless, choose the most recent City, State, and Zip. Family Type describes the number of adults and children in the household.

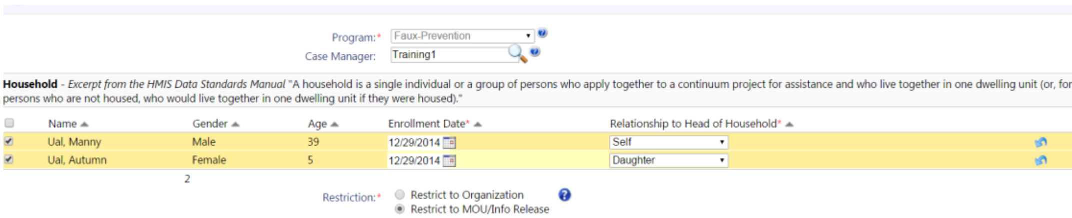
When entering the Information Release #, you are selecting what information is to be shared in HMIS with other agencies. The client's Consent and Release define this data element. Select the magnifying glass and click on the correct Information Release #. The start date will default to the date that you are entering the information into HMIS. Select an end date of exactly one year from today's date to remind you to have the client update the Consent and Release annually. For more information about Consent and Release, please visit the [Consent and Release] section of this manual.

The next screen allows you to quickly enter family member information into HMIS all at once. Simply select the check box below the existing client to begin entering data.

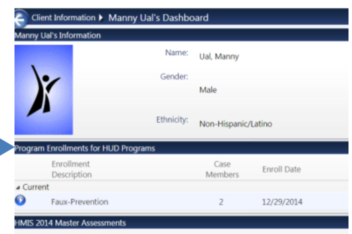


Program Enrollment

When enrolling a client into a program through the intake workflow, simply select the relevant program from the drop-down menu, select the family member who are being enrolled, check that the restriction is correct, and select Save.



When enrolling a client into a program outside of the intake workflow, click on Program Enrollments for HUD Programs on the client dashboard.



This will show a screen with all current and past enrollments for the client. Select Add New to create a new program enrollment.

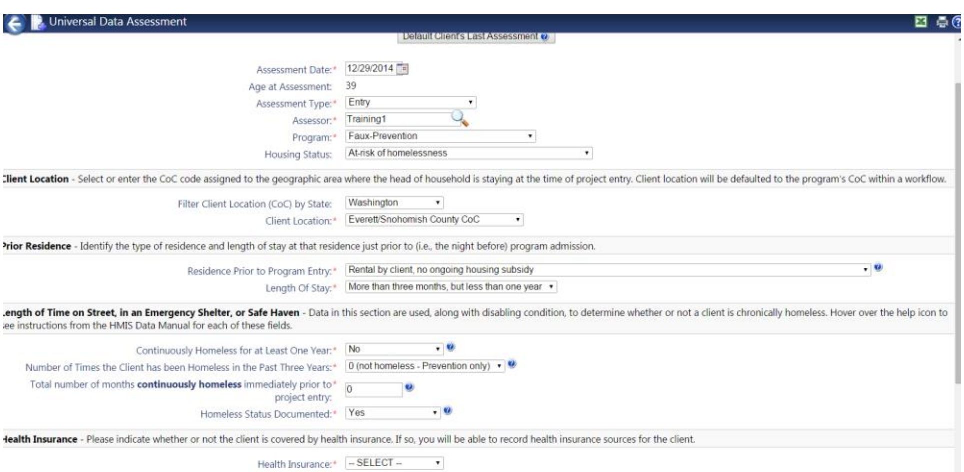
This will take you into the Basic Client Information form. Update any/all relevant data, including the Information Release # and select Finish. Enroll all relevant family members, select the program, and continue as you would in the intake workflow.

Assessments

Depending on the client's status related to Disabling Condition and Veteran's Status and the specific program in which the client is being enrolled, a client could have many or few entry assessments in the intake workflow.

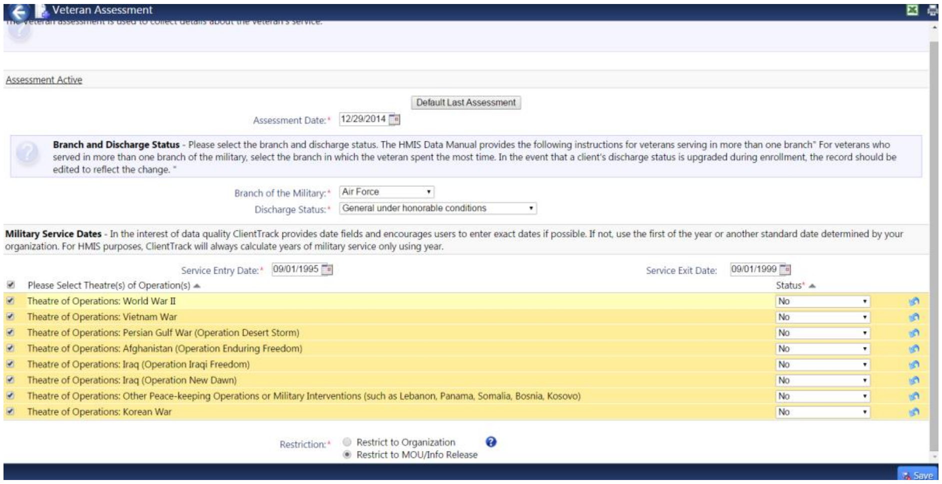
Universal Data Assessment

The first assessment is always the Universal Data Assessment. This assessment asks for some critical housing information to determine the client's homeless status in HMIS.



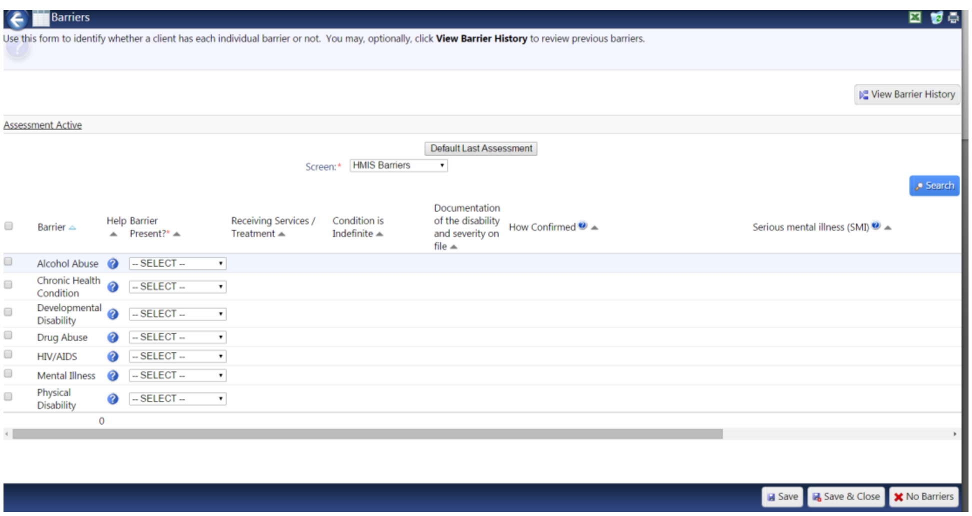
Veteran Assessment

If a Veteran, the next assessment will be the Veteran Assessment. Answer the required questions. For Theatre(s) of Operation, select all and change the status, as relevant.



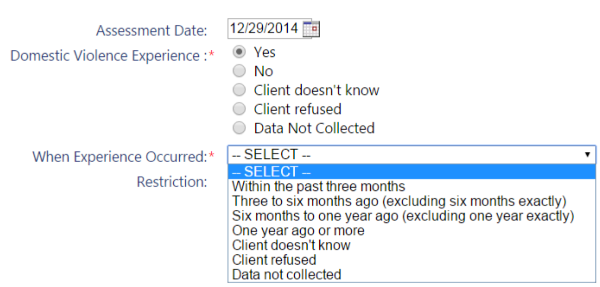
Barriers Assessment

The Barriers assessment is next. If the client has a Disabling Condition or if the client has recently experienced any of the identified barriers, select the barrier and respond to any items known, then select Save and Close. If no barriers, select No Barriers.



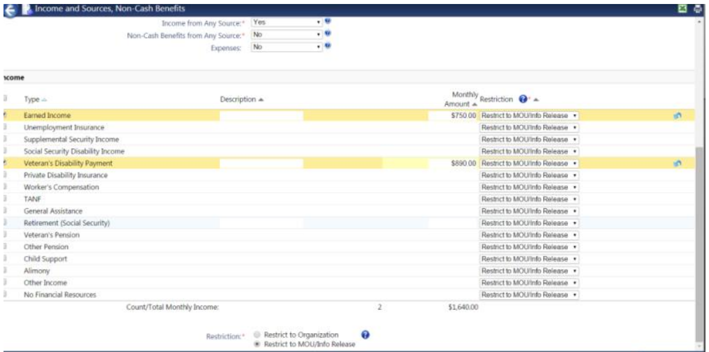
Domestic Violence Assessment

Answer whether or not the client has ever survived a domestic violence experience. If yes, denote when the experience occurred.



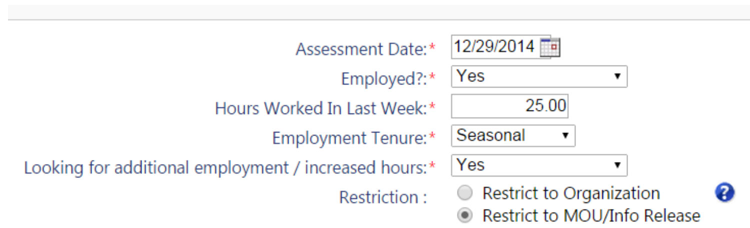
Income and Sources, Non-Cash Benefits

If the client has any income or non-cash benefits, please list them here.

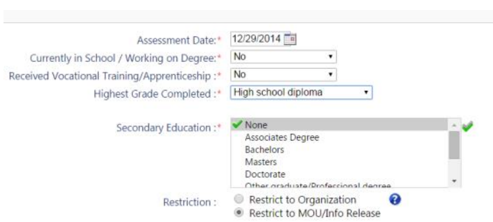


Employment Assessment

Indicate whether or not the client is currently employed, the number of hours currently working, and/or whether not the client is looking for more work/hours.



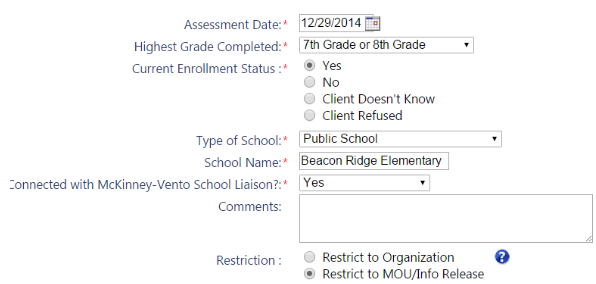
Adult Education Assessment



Indicate the highest level of education achieved by the client and whether or not the client is currently accessing educational services.

Child Education Assessment

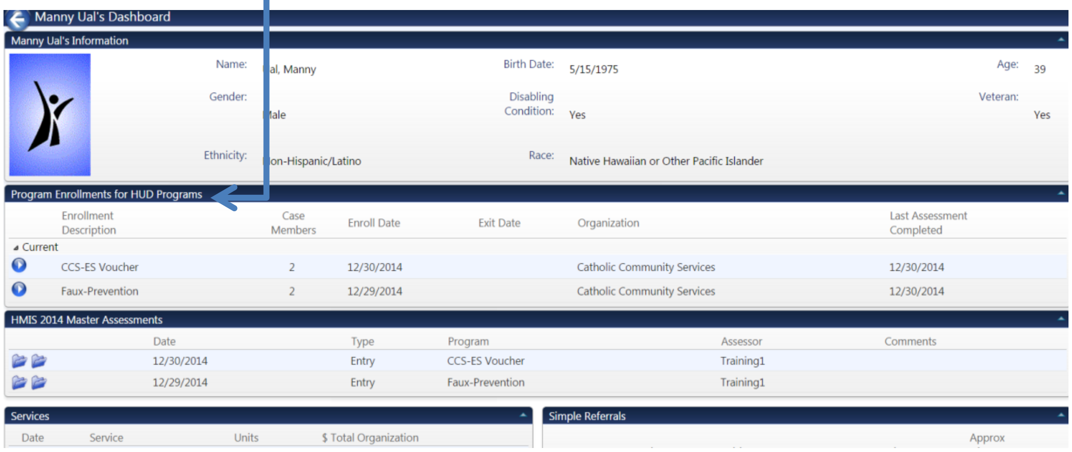
If a child, this assessment will populate instead of employment or adult education.



Program Exit

When a client is exited for a program, for any reason, a formal exit assessment is required.

To conduct an exit, go to the client's dashboard. All current and past enrollments will be shown under the Program Enrollments for HUD Programs section. Select the next to the enrollment from which the client is exiting.



When you select the , you are given several choices. Choose Exit the Enrollment to conduct an exit assessment and perform a formal program exit.

The Enrollment Exit screen asks for the exit date, which will default to today's date. Please be sure to change this to the date the client actually exited the program.

The Destination should be the best descriptor for the client's housing situation immediately following the program's exit. The Exit Reason should be the best descriptor for why the client is exiting the program.

In the Services section, select the date a service was provided, the Grant which funded the service, and the service offered. Click Save.

Next, you will complete an amended Universal Data Assessment. This shortened version asks for specific, program-required information, much of which will automatically populate based off of the entry workflow.

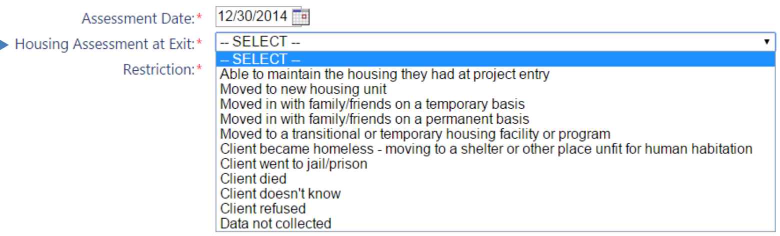
Next, you'll come to the Barriers Assessment. You can select Default Last Assessment if the client's barriers have not changed.

Next, you will come to the Income and Sources Assessment. You can select Default Last Assessment if the client's income and non-cash benefits have not changed, but it is important to be sure.

Next, you will come to the Employment Assessment. You can select Default Last Assessment if the client's employment status has not changed, but it is important to be sure.

Next, you will come to the Adult Education Assessment. You can select Default Last Assessment if the client's education has not changed, but it is important to be sure.

Finally is the Housing Assessment. This requires that you select the Housing Assessment at Exit which best describes the client's housing situation immediately after program exit.



If you are also exiting family members, indicate that on the next page and complete all necessary assessments for each family member. Otherwise, select No. When done, select Finish.

Helpful Hints

Pausing a Workflow

When you begin a workflow, you might find yourself in a situation in which you do not have all of the necessary information or you need to take a break for a while. You can save your place in the workflow by pausing the workflow.

To do so, you will see in the upper left-hand side of the screen when in any workflow.

Click the to pause the workflow and go back to it later. For information about resuming paused workflows, see the Paused Operations section of this manual.

Click the to cancel the workflow and remove any information you entered while in the workflow. This does not delete information entered outside of the workflow.

Screen Shots

When you Submit an Issue, Ask a Question, or Make a Suggestion in HMIS, it is very helpful (and, in some cases, necessary) to attach a screen shot of what you are seeing that is causing concern. This must be done in a way that does not share private client information. Please note that these procedures are only valid on PCs. Please review your Mac user guide for information about taking and using screen shots on Mac computers.

1. To take a screen shot, all you have to do is to hold the Ctrl button on your keyboard and click the Prt Scr (print screen) key on your keyboard. This takes a picture of what is on your computer screen(s).
2. To view the screen shot, click paste into any word editing or Paint document.
3. To remove (or crop) out identifying client information, paste the screen shot in Paint.
    a. You can find your Paint program by going to the Start menu, selecting All Programs, then going into the Accessories menu and selecting Paint.
    b. Paste the screen shot in the main section of the screen.
    c. Use the Crop tool to cut-out any identifying information (including first and last name, birth date, and social security number).
    d. Save the image as a JPEG (picture).
4. When attaching the file, select the correct JPEG file that includes your screen shot.

Duplicate Client Records

Often times, HMIS Lead Agency staff will come across multiple files that are clearly both for the same person, but have been entered into HMIS by separate persons or agencies, creating duplicate records. Duplicate records are devastating to the quality of the data that is reported using HMIS. To avoid creating a supplicate client record, *always* search for a client by the client's name before creating the client record.

Sometimes, you will search for a client and the client will appear not to exist in the system, but HMIS Lead Agency staff still contact you about a possible duplication, anyway. This is because of the way in which HMIS Security works: When clients do not consent to share and/or release their information, the client's file will be invisible to all other agencies. In these situations, you will not know that the client already has an existing record.

HMIS Lead Agency staff work hard to reduce this issue, as much as possible. If you are contacted by HMIS Lead Agency staff for clarification about a client record, it is likely because a duplicate has been found and needs to be edited by the HMIS Lead Agency staff.

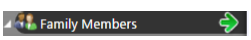
Editing Families

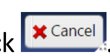
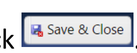
Once families are created in ClientTrack, it can sometimes be difficult to update or add new information if the family structure changes. Below are some basic helpful processes for editing families in HMIS. More advanced or uncommon family editing functions should be discussed with the HMIS Lead Agency prior to being performed by submitting a question. For more information on submitting a question, see the Ask a Question section of this manual.

Adding a Family Member

Adding a new family member might be necessary if one of the family members has/adopts a child, engages in a relationship with someone, or otherwise experiences a change in the family structure through the addition of a new person. If an existing individual or family seeks to bring-in a new family member, the process is relatively straight-forward:

1. Go to the head of household's client dashboard.
2. On the left-hand side of the screen, select the option titled Family Members.

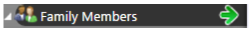
3. On this new screen, type click on the that is not checked and begin entering the information for the new family member. After entering the name, the system will search for an existing client.
   a. If the client does not exist in HMIS, click 
   .
   b. If the client does exist in HMIS, select the name of the client from the list.
4. When you are finished entering the client's information, click 
   .

It is important to note that, while this process adds the person to the family, it does not enroll the person into a program. If this step needs to be taken, see the Program Enrollment section of this manual.

Changing the Head of Household

In situations in which the family structure changes so that the original head of household is no longer serving as the head of household (which can be defined by your program), you can change an existing family member to the current head of household.

To change an existing family member to the new head of household:

1. Go to the current head of household's client dashboard.
2. On the left-hand side of the screen, select the option titled Family Members.


3. Scroll to the column titled "Relationship to Head of Household." Change the current head of household from Self to another accurate relationship. Change the new head of household to Self.
4. When you are finished entering the client's information, click 

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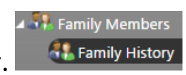
It is important to note that changing the head of household is not a critical data element after the family members have already been enrolled in a program. It is your agency's policy that should determine when it is appropriate to change this designation.

It is also important to note that this process does not change the family's name. For information about this, please contact the HMIS Lead Agency.

Removing a Family Member

In some circumstances, family members who were once a part of the family are no longer considered to be a part of the family. These circumstances might include (but are not limited to) when children leave the family to pursue services on their own or in with a new family, when a break-up or separation of partners occurs, or when a family member passes away.

To remove a family member, follow these steps:

1. Go to the client dashboard of the client who is leaving the family.
2. On the left-hand screen, select Family Members, then Family History. 

3. Click on the Add this Client to Another Family button on the upper right-hand side of the screen.
4. Either search for an existing family into which the client is now a member or create a new family using the client's information by clicking on the  in the Family Name box.
5. Select the Relationship to Head of Household. You can leave the Relationship Type blank.
6. Select Set as Current Family.
7. Only click Remove Client from all Other Families if the client will not be re-joining any past families.
8. Click 

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Please note that if the head of household is the person who is leaving the family, you should first designate a different family member as the current head of household before remove the old head of household from the family.

It is also important to note that removing a client from the family, even if the family was named after the client being removed, does not change the name of the family. For information about this, please contact the HMIS Lead Agency.